

## AMENDMENTS TO THE CLAIMS

Please replace all prior versions and listings of claims in the application with the listing of claims as follows:

### **Listing of Claims**

1.-12. (Previously Canceled)

13. (Currently Amended) A processor-implemented method comprising:

generating a user interface including a plurality of user selectable corporate entities and a user selectable corporate information category tab;

receiving a user selection of a corporate entity via the user interface;

accessing retrieving via a processor, corporate information of ~~a plurality of selectable~~ the user selected corporate ~~[[entities]]~~ entity, wherein the corporate information includes at least ownership information, legal documents information and contact information relating to each corporate entity;

determining a plurality of corporate entities having ownership relationships with the user selected corporate entity based on the retrieved corporate information;

presenting a tiered selectable corporate ownership structure including the determined plurality of selectable corporate entities showing ownership relationships and a plurality of the user selectable corporate information category tab elements based on the ~~accessed~~ retrieved corporate information,

wherein a first one of the plurality of corporate entities is at least a partial owner of a second one of the plurality of corporate entities and is graphically presented as being organizationally upstream from the second one of the plurality of corporate entities,

wherein a third one of the plurality of corporate entities is at least partial owned by a fourth one of the plurality of entities and is graphically presented as being organizationally downstream from the fourth one of the plurality of entities, and

wherein each of the plurality of corporate entities is shareholder-owned; receiving a selection of the second corporate entity;

receiving a selection of the user selectable corporate information category tab ~~one of the plurality of selectable elements;~~

~~determining~~ retrieving a category of corporate information corresponding to the one selected corporate information category tab element and relating to the selected second corporate entity based on the ~~accessed~~ retrieved corporate information; and

presenting the ~~determined~~ retrieved information to a user.

14. (Previously Canceled)

15. (Previously Presented) A method according to Claim 13, wherein the determined information comprises one or more of:

information relating to a formation of the second corporate entity;

a location of corporate documents relating to the second corporate entity;

1 contact information relating to the second corporate entity;

2 ownership information relating to the second corporate entity;

3 information relating to regulators of the second corporate entity;

4 information relating to officers of the second corporate entity;

5 information relating to jurisdictions in which the second corporate entity is  
6 qualified to do business;

7 information relating to reports filed or to be filed on behalf of the second corporate  
8 entity;

9 controllers information relating to the second corporate entity; and

10 funds information relating to the second corporate entity.

11 16. (Previously Presented) A method according to Claim 13, further comprising:

12 receiving instructions to generate a document including document information  
13 relating to the selected second corporate entity;

14 determining the document information;

15 generating the document; and

16 presenting the document to the user.

17 17. (Original) A method according to Claim 13, further comprising:

18 receiving instructions to edit the determined information;

19 determining whether the user is authorized to edit the determined information; and

1 editing the determined information if it is determined that the user is authorized to  
2 edit the determined information.

3 18. (Original) A method according to Claim 17, further comprising: associating  
4 information identifying the user with the edited information.

5 19. (Original) A method according to Claim 17, further comprising: presenting an  
6 indication that the determined information is in the process of being edited.

7 20. (Original) A method according to Claim 13, further comprising:  
8 associating information identifying a date on which the information was edited with  
9 the edited information.

10 21. (Previously Presented) A method according to Claim 13, further comprising:  
11 receiving a request for an image of a document relating to the selected second  
12 corporate entity; and  
13 presenting the image to the user.

14 22. (Currently Amended) A computer-readable medium storing processor-  
15 executable instructions comprising instructions to:

16 generate a user interface including a plurality of user selectable corporate entities and  
17 a user selectable corporate information category tab;

18 receive a user selection of a corporate entity via the user interface;

19 access retrieve via a processor, corporate information of a plurality of selectable the  
20 user selected corporate [[entities]] entity, wherein the corporate information includes at least

ownership information, legal documents information and contact information relating to each corporate entity;

determine a plurality of corporate entities having ownership relationships with the user selected corporate entity based on the retrieved corporate information;

present a tiered selectable corporate ownership structure including the determined plurality of selectable corporate entities showing ownership relationships and ~~a plurality of the user selectable corporate information category tab elements~~ based on the accessed retrieved corporate information,

wherein a first one of the plurality of corporate entities is at least a partial owner of a second one of the plurality of corporate entities and is graphically presented as being organizationally upstream from the second one of the plurality of corporate entities,

wherein a third one of the plurality of corporate entities is at least partial owned by a fourth one of the plurality of entities and is graphically presented as being organizationally downstream from the fourth one of the plurality of entities, and

wherein each of the plurality of corporate entities is shareholder-owned;  
receive a selection of the second corporate entity;

receive a selection of the user selectable corporate information category tab ~~one of the plurality of selectable elements~~;

~~determine~~ retrieve a category of corporate information corresponding to the one

1 selected corporate information category tab element and relating to the selected second  
2 corporate entity based on the ~~accessed~~ retrieved corporate information; and  
3 present the ~~determined~~ retrieved information to a user.

4 23. (canceled)

5 24. (Previously Presented) A computer-readable medium according to Claim 22,  
6 wherein the determined information comprises one or more of:

7 information relating to a formation of the second corporate entity;

8 a location of corporate documents relating to the second corporate entity;

9 contact information relating to the second corporate entity;

10 ownership information relating to the second corporate entity;

11 information relating to regulators of the second corporate entity;

12 information relating to officers of the second corporate entity;

13 information relating to jurisdictions in which the second corporate entity is  
14 qualified to do business;

15 information relating to reports filed or to be filed on behalf of the second corporate  
16 entity;

17 controllers information relating to the second corporate entity; and

18 funds information relating to the second corporate entity.

19 25. (Previously Presented) A computer-readable medium according to Claim 22,

1 further comprising instructions to:

2 receive instructions to generate a document including document information  
3 relating to the second corporate entity;

4 determine the document information;

5 generate the document; and

6 present the document to the user.

7 26. (Previously Presented) A computer-readable medium according to Claim 22,  
8 further comprising instructions to:

9 a step to receive instructions to edit the determined information;

10 a step to determine whether the user is authorized to edit the determined  
11 information; and

12 a step to edit the determined information if it is determined that the user is  
13 authorized to edit the determined information.

14 27. (Previously Presented) A computer-readable medium according to Claim 26,  
15 further comprising instructions to:

16 associate information identifying the user with the edited information.

17 28. (Previously Presented) A computer-readable medium according to Claim 26,  
18 further comprising instructions to:

19 present an indication that the determined information is in the process of being

1    edited.

2           29. (Previously Presented) A computer-readable medium according to Claim 22,  
3    the process steps further comprising instructions to:

4           associate information identifying a date on which the information was the  
5    edited information.

6           30. (Previously Presented) A computer-readable medium according to Claim 22,  
7    the process steps further comprising instructions to:

8           receive a request for an image of a document relating to the second corporate entity;  
9    and

10          present the image to the user.

11          31. (Currently Amended) An apparatus to manage corporate entities,  
12    comprising:

13          a processor; and

14          a storage device in communication with said processor and storing instructions  
15    adapted to be executed by said processor to:

16          generate a user interface including a plurality of user selectable corporate entities and  
17    a user selectable corporate information category tab;

18          receive a user selection of a corporate entity via the user interface;

19          access retrieve via a processor, corporate information of a plurality of selectable the  
20    user selected corporate [[entities]] entity, wherein the corporate information includes at least



ownership information, legal documents information and contact information relating to each corporate entity;

determine a plurality of corporate entities having ownership relationships with the user selected corporate entity based on the retrieved corporate information;

present a tiered selectable corporate ownership structure including the determined plurality of selectable corporate entities showing ownership relationships and a plurality of the user selectable corporate information category tab elements based on the accessed retrieved corporate information,

wherein a first one of the plurality of corporate entities is at least a partial owner of a second one of the plurality of corporate entities and is graphically presented as being organizationally upstream from the second one of the plurality of corporate entities,

wherein a third one of the plurality of corporate entities is at least partial owned by a fourth one of the plurality of entities and is graphically presented as being organizationally downstream from the fourth one of the plurality of entities, and

wherein each of the plurality of corporate entities is shareholder-owned;  
receive a selection of the second corporate entity;

receive a selection of the user selectable corporate information category tab ~~one of the plurality of selectable elements;~~

~~determine~~ retrieve a category of corporate information corresponding to the one

1 selected corporate information category tab element and relating to the selected second  
2 corporate entity based on the ~~accessed~~ retrieved corporate information; and  
3 present the ~~determined~~ retrieved information to a user.

4 32. (Previously Presented) An apparatus according to Claim 31, wherein the  
5 determined information comprises one or more of:

6 information relating to a formation of the second corporate entity;  
7 a location of corporate documents relating to the second corporate entity;  
8 contact information relating to the second corporate entity;  
9 ownership information relating to the second corporate entity;  
10 information relating to regulators of the second corporate entity;  
11 information relating to officers of the second corporate entity;  
12 information relating to jurisdictions in which the second corporate entity is qualified  
13 to do business;  
14 information relating to reports filed or to be filed on behalf of the second corporate  
15 entity;  
16 controllers information relating to the second corporate entity; and  
17 funds information relating to the second corporate entity.

18 33. (Previously Presented) An apparatus according to Claim 31, the instructions  
19 further adapted to be executed by said processor to:

1 receive instructions to generate a document including document information  
2 relating to the second corporate entity;  
3 determine the document information;  
4 generate the document; and  
5 present the document to the user.

6 34. (Previously Presented) An apparatus according to Claim 31, the instructions  
7 further adapted to be executed by said processor to:

8 receive instructions to edit the determined information;  
9 determine whether the user is authorized to edit the determined information; and  
10 edit the determined information if it is determined that the user is authorized to edit  
11 the determined information.

12 35. (Previously Presented) An apparatus according to Claim 34, the instructions  
13 further adapted to be executed by said processor to:

14 associate information identifying the user with the edited information.

15 36. (Previously Presented) An apparatus according to Claim 34, the instructions  
16 further adapted to be executed by said processor to:

17 present an indication that the determined information is in the process of being  
18 edited.

19 37. (Previously Presented) An apparatus according to Claim 31, the instructions

1 further adapted to be executed by said processor to:

2 receive a request for an image of a document relating to the second corporate entity;  
3 and  
4 present the image to the user.

5 38. (Currently Amended) A processor-implemented method comprising:

6 generating a user interface including a plurality of user selectable corporate entities  
7 and a user selectable corporate information category tab;

8 receiving a user selection of a corporate entity via the user interface;

9 ~~accessing~~ retrieving via a processor, corporate information of ~~a plurality of selectable~~  
10 the user selected corporate ~~[[entities]]~~ entity, wherein the corporate information comprises  
11 one or more of:

12 information relating to a formation of the second corporate entity,  
13 a location of corporate documents relating to the second corporate entity,  
14 contact information relating to the second corporate entity,  
15 ownership information relating to the second corporate entity,  
16 information relating to regulators of the second corporate entity,  
17 information relating to officers of the second corporate entity,  
18 information relating to jurisdictions in which the second corporate entity is  
19 qualified to do business,

1 information relating to reports filed or to be filed on behalf of the second corporate  
2 entity,

3 controllers information relating to the second corporate entity, and

4 funds information relating to the second corporate entity;

5 determining a plurality of corporate entities having ownership relationships with the  
6 user selected corporate entity based on the retrieved corporate information;

7 presenting a tiered selectable corporate ownership structure including the determined  
8 plurality of selectable corporate entities showing ownership relationships and ~~a plurality of~~  
9 the user selectable corporate information category tab elements based on the accessed  
10 retrieved corporate information,

11 wherein a first one of the plurality of corporate entities is at least a partial  
12 owner of a second one of the plurality of corporate entities and is graphically presented as  
13 being organizationally upstream from the second one of the plurality of corporate  
14 entities,

15 wherein a third one of the plurality of corporate entities is at least partial  
16 owned by a fourth one of the plurality of entities and is graphically presented as being  
17 organizationally downstream from the fourth one of the plurality of entities, and

18 wherein each of the plurality of corporate entities is shareholder-owned;

19 receiving a selection of the second corporate entity;

20 receiving a selection of the user selectable corporate information category tab ~~one of~~

1 the plurality of selectable elements;

2 ~~determine~~ retrieving a category of corporate information corresponding to the one  
3 selected corporate information category tab element and relating to the selected second  
4 corporate entity based on the ~~accessed~~ retrieved corporate information; and

5 presenting the ~~determined~~ retrieved information to a user.

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